User manual for Wessex '2014' web site

1 Introduction

This is aimed at admin user of the web site (committee mainly). It is expected that member side function should be self explanatory.

All the dashboard options are under the 'Wessex admin' main menu.

2 Membership

Membership information is stored along with the wordpress user information. The unique identifier is the login name.

2.1 Joining process

New members complete the joining form, which results in a new user being created. The joining date is set to the current date. For youth applications the parent/guardian must be logged in and apply for them.

A blank 'renewal date' indicates they are not yet members.

An email is sent with login details, they then login to pay (this verifies the email address)

A 'pay membership now' button on the membership widget area take them to the payment page where the amount owed and payment options are given.

They pay by the paypal link or off line. In all cases the web site takes no action at this point (note an option for an email alert could be added).

When payment is received, the 'Member list/edit' menu is used to set the renew date, by clicking on renew in the list view. Select 'Pending members' only to keep the list short so you can find the applying members easily.

2.2 Renewal process

When membership is due a payment button appear in the membership widget area. This takes then to the payment page. This and the following process is as for new members.

This process also covers lapsed members if they still have a user account. The joining fee is then added.

2.3 Editing Details

The 'Member list/edit' menu provide a list of members with section options such as pending members only.

A edit sheet can be opened to edit members details.

For most field a 'BMC' version is also provided. This can be used to record what the BMC has on record.

In most cases members should update their own details using the 'my profile' page. However some details are not made available to them such as membership type.

2.4 Creating new members

If the membershio sec needs to add a member, then it is best to simply use the membership application proces. However a wordpress user can be added, then the edit details used to put in the other information.

2.5 Export of information

The dashboard member export page provides the output of member information to a file in various formats.

2.5.1 Newsletter

Details of members who have joined since a specified date. Suitable for including in the newsletter.

Note other formats to be added.

2.5.2 BMC

Produces a CVS file in the format required by the BMC for all current members. Where the BMC varient of a field is set this is used, otherwise the main profile data is used.

Note BMR ref and main contact set under 'Setting'.

2.5.3 CVS

Produces a CVS file containing all the data held for all users. Hence includes pending and lapsed members.

2.5.4 Post labels

produce a file of postal addresses. Members at the same address (based on giving the login name of the other person), are combined.

2.6 Settings

The 'Settings' menu allows a number of parameters to be set. These are things that will change infrequently such as membership rates.

There is only limited checking on these so make sure everything is working after changes.

2.7 Shortcodes

The following shortcodes are used to insert data on the main web pages:

Code	**Page used on**	**Description**
[membership_renew_date]	Join the club	Outputs the membership renew date.
[membership_rates_table]	Join the club	Outputs a table of membetship rates.
[membership_rate]	Pay membership	Outputs the payment due from the current user.

		Use [membership_rate paypal=yes] to include paypal charges
[membership_description]	Pay membership	Description of membership type, including if lapsed

The following short codes are used to produce complete pages:

Code	Page used on	Accessed from	Description
[hut_calendar]	Booking	Main menu	Outputs the hut calendar
[hut_book_form]	Hut Booking Form	Link from hut calendar page	Form to enter hut bookin details
[hut_book_list]	Hut Booking list	Main menu	
[meet_list]	Meet List	Main Menu	Outputs list of meets
[meet_detail]	Meet Detail	Link from meet list page	Outputs details of meet and meet bookings
[meet_book]	Meet Book	Link from Meet Details page	Form to enter meet booking
[meet_book_admin]	Meet Book Admin	Link from Meet Details page	Admin only page to edit meet bookings
[member_application]	Membership Application	Link from Join The Club page	Form for membership application
[member_list]	Members List	Main menu	Outputs list of members with option to display details.
[member_profile_edit]	My profile	Main menu	Provides form for member to edit own details

In addition [file_list folder='folder_name'] produce a list of files stored in a folder 'folder_name'. Admin option to add and delete files. This can be used on its own on a page or mixed with other information. Multiple file list can be on the same page (with different folder names).

Used for the document library mainly.

3 Hut

Hut booking are added automatically and an email sent. The dashboard page is used to confirm bookings (usually once paid) and edit bookings.

4 Meets

The meet dashboard page allows the creation and editing of meets. This is also linked from the meet detail page to provide quick access.

5 Mailing list

A link to the mailing list is include. This allows selection of mailing list subscriptions by members on their profile page, or by admin on the member edit page.

Setup of mail list is on the dashboard under 'Mailman'. If selected there new members are automatically subscribed.